Defense Acquisition University

Earned Value Management

Acquisition Insight Days

April 2009

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DAU EVMS POC

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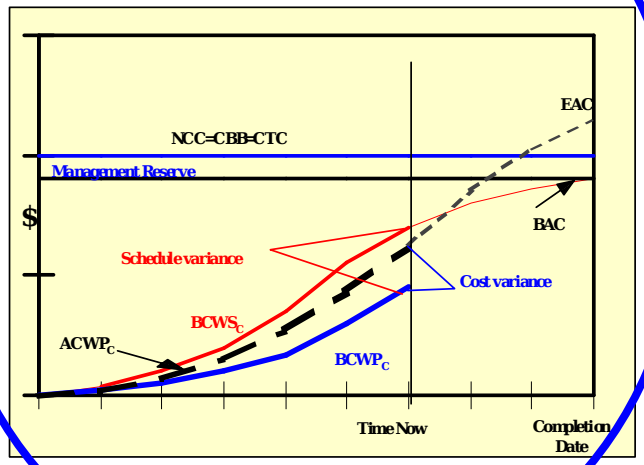
What's In Your PM Toolkit?

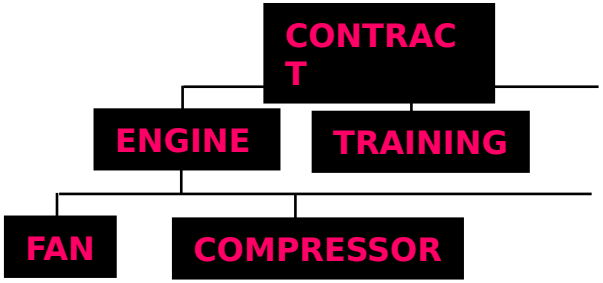
Earned Value Performance



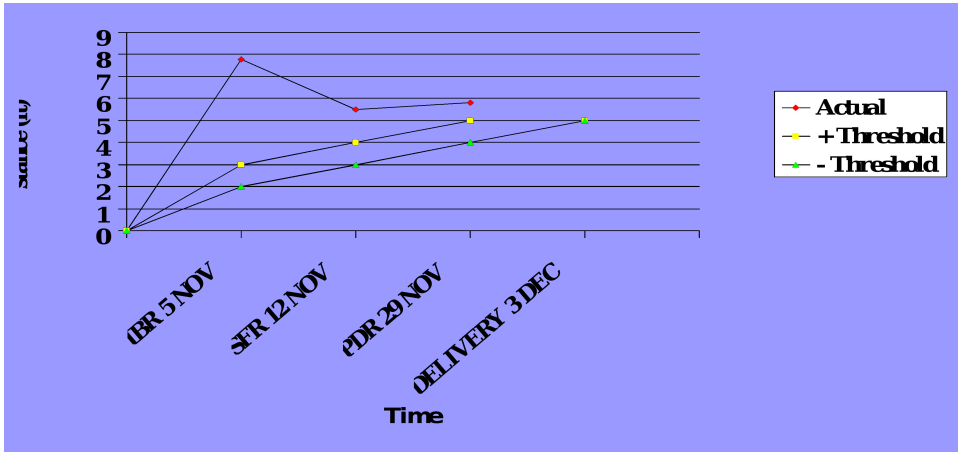
Risk Matri

X		
3	3	3
2	2	3
1	2	3

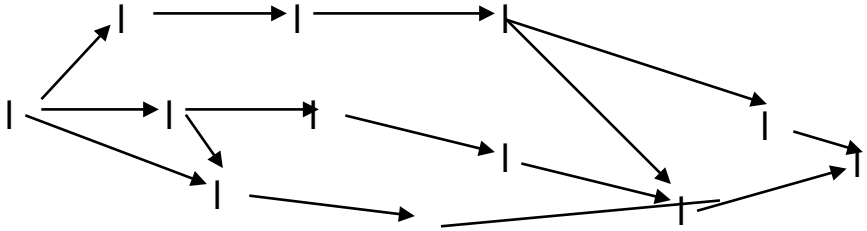
WORK BREAKDOWN STRUCTUR



TPM's

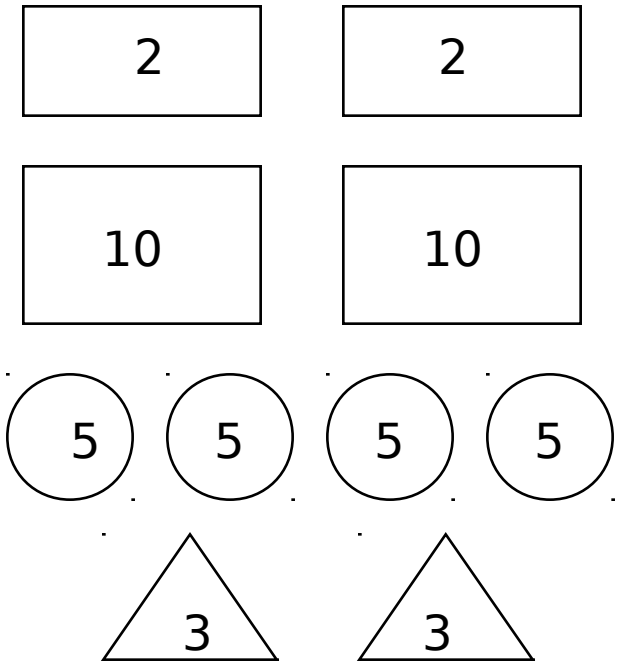


Network Schedule



Traditional Measurement

PLANNED



BUDGET = $50

ACTUAL COST

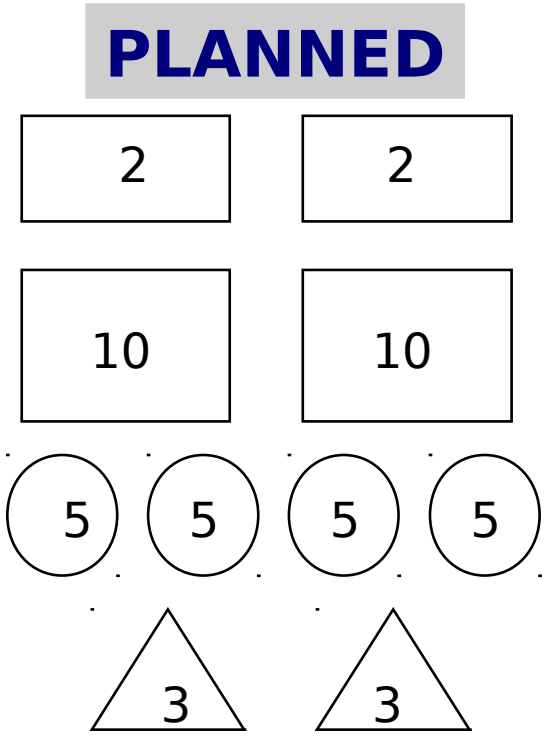
= $15

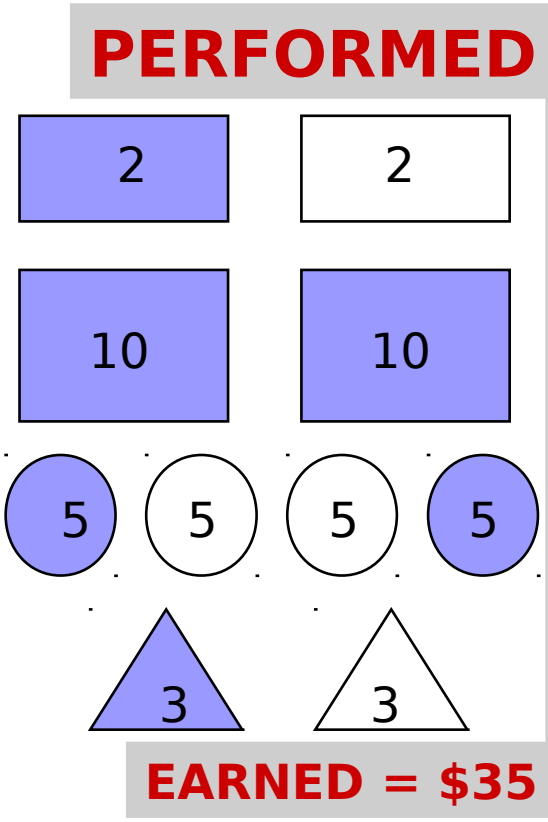
= $25

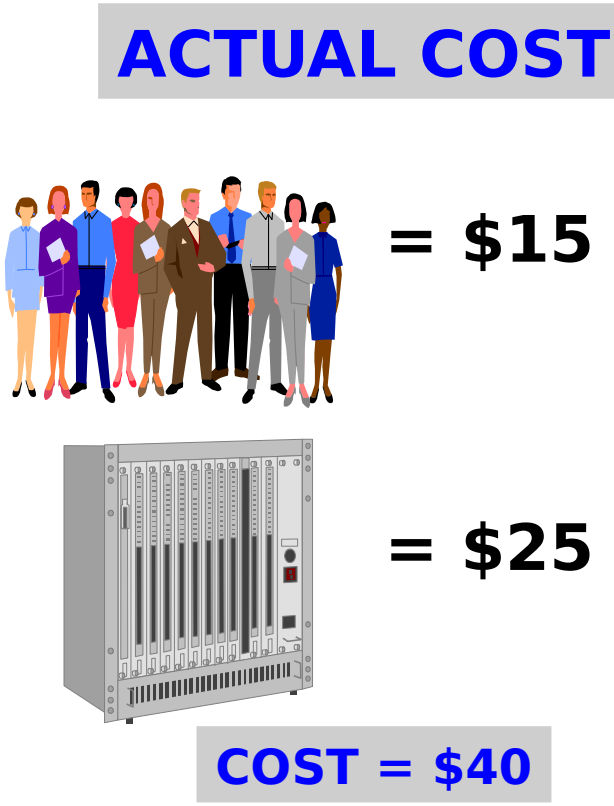
COST = $40

STATUS: Variance = Budget - Actual = + $10
Favorable

Earned Value Measurement







STATUS: Schedule Variance = Earned - Budget = -15
Unfavorable

Cost Variance = Earned - Actual = - 5

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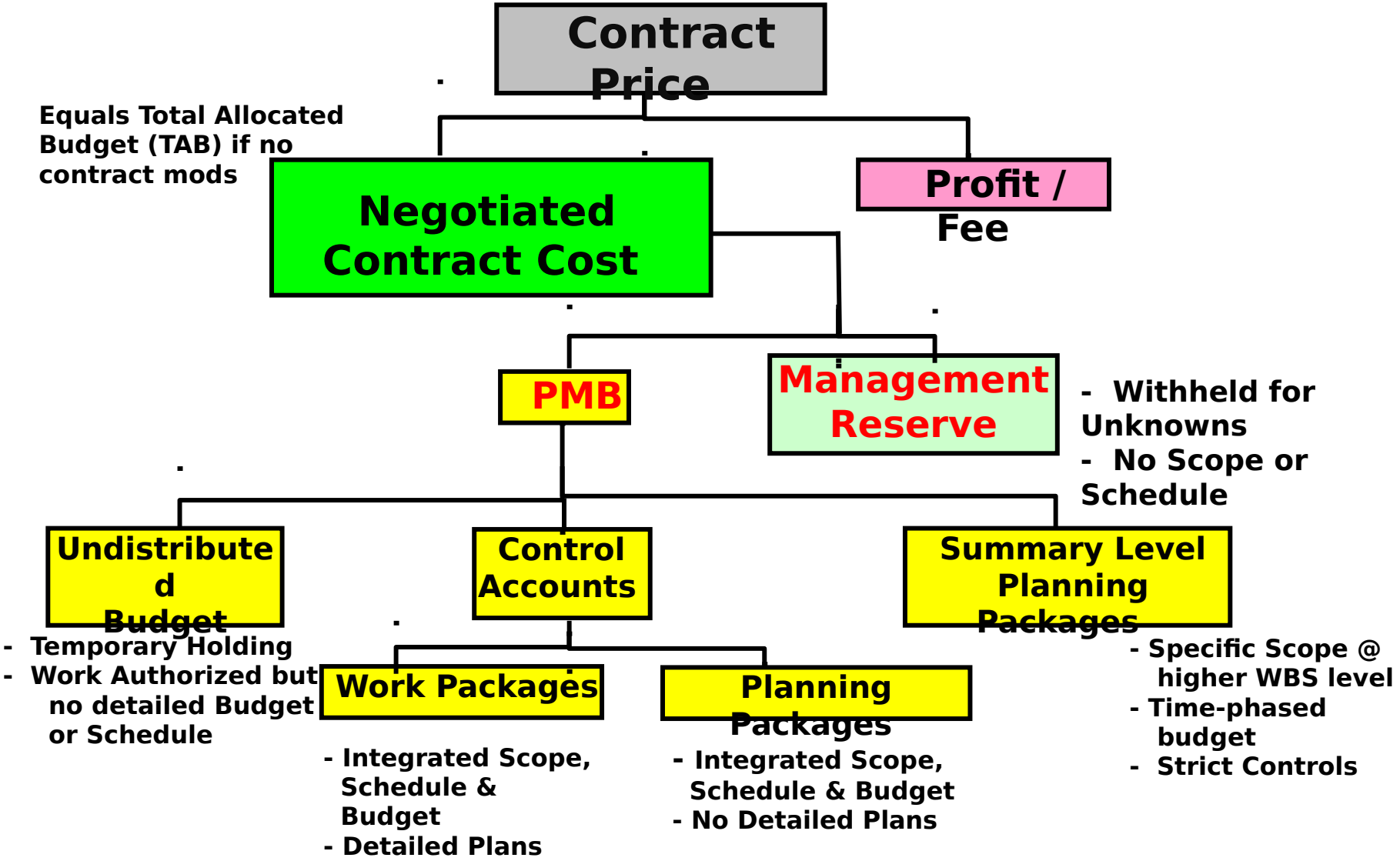
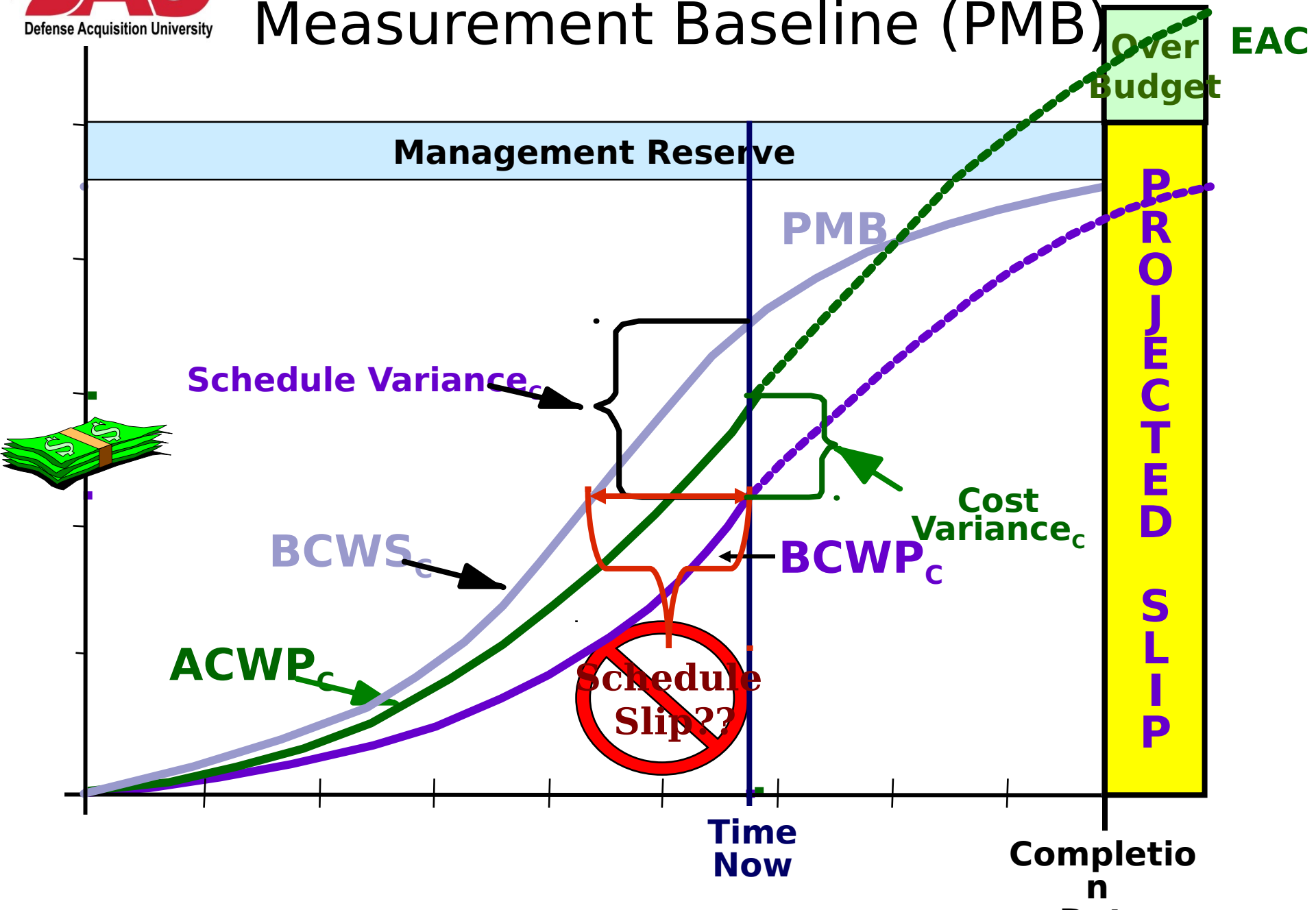
EV ANALYSIS

Relationship of the Contract Price to the Earned Value Management System (EVMS)



Time-Phased Performance Measurement Baseline (PMB)



Assessing Contractor Performance

- Gather the “vital signs”
  - Usually given in a cost report
  - Terms such as BCWP, BCWS, ACWP, EAC, LRE, BAC
- Process the “vital signs”
  - Calculate variances, indices, percents, forecasts
  - A thorough analysis will use each category
- Determine what the “vital signs” mean
  - Based on the “goodness” or “badness” of the vital signs, what does that tell you?

Step-By-Step Analysis Process

1. Gather earned value data
   - BCWS, BCWP, ACWP, BAC (from CPR Format 1)
2. Calculate point-in-time performance
   - Cost Variance (CV) and Schedule Variance (SV)
   - Can find on CPR Format 1
3. Calculate trend indicators
   - Cost Performance Index (CPI) and Schedule Performance Index (SPI)
4. Calculate performance against the budget
   - %Complete, % Spent, %Scheduled

Step-By-Step Analysis Process (cont'd)

5. **Forecast the cost to complete**
   - **Estimate at Completion (EAC) (govt estimate)**
6. **Calculate efficiency necessary to achieve EAC (or LRE or BAC)**
   - **To-Complete Performance Index (TCPI)**
7. **Analyze performance**
   - **Evaluate and discuss variances, trend indicators, progress against budget, forecasted cost to complete, efficiency needed to complete**
8. **What is the status of our program?**

EV Key Variables

BCWS BCWP ACWP

A = actual
B = budgeted or planned
C = cost
W = work
P = performed
S = scheduled

BCWS = This is what the plan called for
BCWP = This is what the actual work done should have
ACWP = This is what the actual work actually costs

EV Metrics

CV SV

C = cost
S = schedule
V = variance

CV = Difference between the budgeted cost and actual cost of work performed (negative is unfavorable)

SV = Difference between the work we planned to accomplish and the work that was performed (negative is unfavorable)

EV Metrics

CPI SPI

C = cost
S = schedule
P = performance
I = index

CPI = How much actual work are we getting for each dolla
SPI = How efficient is the contractor in terms of schedule

Earned Value Measurement

- SPI = schedule efficiency
  - $SPI_{Program}$ < 1.0, program is currently behind schedule
  - SPI_{Task} < 1.0, task is currently behind schedule
    - » Program is only behind schedule if task is on the critical path
- CPI = cost efficiency (how much work is done per dollar spent)
  - $CPI_{Program}$ < 1.0, program is currently over budget
  - CPI_{Task} < 1.0, task is currently over budget
    - » Program may or may not be over budget

If either CPI or SPI < 0.70, then may have to re-baseline

Variances vs. Performance Indices

BCWP = $600K
ACWP = $700K

CV = BCWP - ACWP
CV = $600K- $700K
CV = ($100K)

$$CPI = \frac{BCWP}{ACWP} = \frac{\$600K}{\$700K}$$

CPI = 0.86

BCWP = $50K
BCWS = $150K

SV = BCWP – BCWS
SV = $50K- $150K
SV = ($100K)

$$SPI = \frac{BCWP}{BCWS} = \frac{\$50K}{\$150K}$$

SPI = 0.33

Variances measure magnitude, indices measure efficiency

Earned Value Measurement

- % Spent $= \frac{ACWP}{BAC}$
- % Complete $= \frac{BCWP}{BAC}$
- If % spent > % complete, unfavorable
- If % spent < % complete, favorable

EV Key Variables

BAC EAC

B = budgeted or planned
E = estimate
A = at
C = completion

BAC = What the entire program is supposed to cost

EAC = What we now think the entire program will actually cost

Mathematical Approach to EAC Concept

- **EAC = Actuals to Date + Work Remaining / Efficiency Factor**
- **Actuals to Date = $ACWP_{CUM}$**
- **Work Remaining = BAC – $BCWP_{CUM}$**
- **Efficiency (Performance) Factors = Various**
  - ***CPI_{CUM}***
  - ***Composite (CPI_{CUM} x SPI_{CUM})***
  - ***3-Period (month) CPI***
  - ***6-Period (month) CPI***

Representative EAC Formulas

Method	Formula
1. EAC (Cum CPI)	$ACWP_{CUM} + \frac{BAC - BCWP_{CUM}}{CPI_{CUM}} = \frac{BAC}{CPI_{CUM}}$
2. EAC (Composite)	$ACWP_{CUM} + \frac{BAC - BCWP_{CUM}}{CPI_{CUM} \times SPI_{CUM}}$
3. EAC (3/6 Month CPI)	$ACWP_{CUM} + \frac{BAC - BCWP_{CUM}}{\frac{(BCWP)_{3MO/6MO}}{(ACWP)_{3MO/6MO}}}$
4. EAC (Weighted)	$ACWP_{CUM} + .8\left(\frac{BAC - BCWP_{CUM}}{CPI_{CUM}}\right) + .2\left(\frac{BAC - BCWP_{CUM}}{SPI_{CUM}}\right)$

Estimate at Completion (EAC)

(Estimate of Total Cost Thru any Given Level)

Alternative Approach for Computing EAC

If assumption is made that contractor will <u>not</u> use available MR to complete contract, use following "standard" formula:

$$EAC = ACWP_{cum} + \frac{BAC - BCWP_{cum}}{\text{"Efficiency Factor"}}$$

If assumption is made that contractor <u>will</u> use available MR to complete contract, use following "alternative" formula:
This is considered a "contract level EAC"

$$EAC = ACWP_{cum} + \frac{TAB - BCWP_{cum}}{\text{"Efficiency Factor"}}$$

Note: TAB = BAC + Management Reserve

Earned Value Data Interpretation

EVMS Analysis: Which EAC to use? (that is, EAC based on which efficiency factor?) Should you use BAC or TAB to compute EAC? (Consider Management Reserve)

Efficiency Factors:

– Cumulative CPI: tends to be the most optimistic estimate

– Composite (CPI_{CUM} x SPI_{CUM}): tends to be the most pessimistic estimate; weights cost and schedule equally

– Three period (month) CPI: shows most current cost performance

– Six period (month) CPI: shows longer timeframe for cost performance – may be more accurate (or less accurate) regarding true trends

– Weighted (.8 CPI_{CUM} x .2 SPI_{CUM}): weights cost more than schedule

EV Metrics

TCPI

T = to
C = complete
P = performance
I = index

TCPI = How efficient do I have to be to finish on ta
(target could be budget (BAC) or EAC)

CPI measures past efficiency; TCPI measures future efficiency

To Complete Performance Index (TCPI)

(Cost Efficiency Needed from "Now" to Achieve a Specific Target Cost)

Alternative Approach for Computing TCP

If assumption is made that contractor will <u>not</u> use available MR to complete contract, use following "standard" formula:

$$TCPI = \frac{\text{Work Remaining}}{\text{Budget Required}} = \frac{BAC - BCWP_{cum}}{\text{"Target"} - ACWP_{cum}}$$

If assumption is made that contractor <u>will</u> use available MR to complete contract, use following "alternative" formula:
This is considered a "contract level TCPI"

$$TCPI = \frac{\text{Work Remaining}}{\text{Budget Required}} = \frac{TAB - BCWP_{cum}}{\text{"Target"} - ACWP_{cum}}$$

TAB = BAC + Management Reserve

Earned Value Data Interpretation

- What Do the Vital Signs Mean? Questions to Ask:
  - Is the contractor's current performance favorable or unfavorable?
    - Evaluate CV, SV, CPI, SPI, %spent, %complete
  - What are the cost/schedule drivers on our program? What actions need to be taken to improve performance?
  - Is the contractor's EAC (LRE) realistic? Is the Government's?
    - Compare TCPI to CPI_{cum}
    - If TCPI > CPI_{cum} by more than 0.05, target is not realistic
  - Is the price to complete the program forecasted to exceed the contract ceiling price? Exceed the budget?
  - If significant unfavorable variances, is the baseline still valid? Is re-baselining necessary?

EVM is a tool to help drive successful project management

EVM Gold Card

https://acc.dau.mil/CommunityBrowser.aspx?

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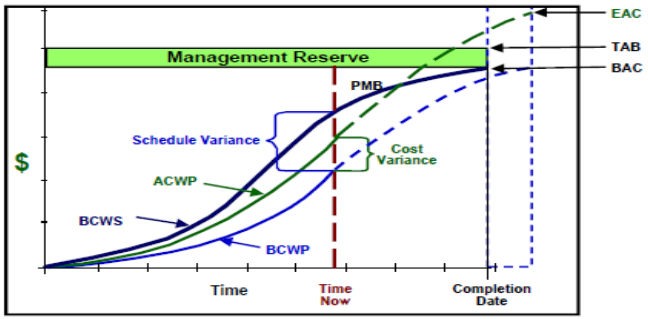
Earned Value Management 'Gold Card'



VARIANCES Favorable is Positive, Unfavorable is Negative

Cost Variance	CV	= BCWP – ACWP	CV % = (CV / BCWP) *100
Schedule Variance	SV	= BCWP – BCWS	SV % = (SV / BCWS) * 100
Variance at Completion	VAC	= BAC – EAC	

OVERALL STATUS

% Schedule	= ($BCWS_{CUM}$ / BAC) * 100
% Complete	= ($BCWP_{CUM}$ / BAC) * 100
% Spent	= ($ACWP_{CUM}$ / BAC) * 100

DoD TRIPWIRE METRICS Favorable is > 1.0, Unfavorable is < 1.0

Cost Efficiency	CPI = BCWP / ACWP
Schedule Efficiency	SPI = BCWP / BCWS

BASELINE EXECUTION INDEX (BEI) (Schedule Metric)
BEI = # of Baseline Tasks Actually Completed / # of Baseline Tasks Scheduled for Completion

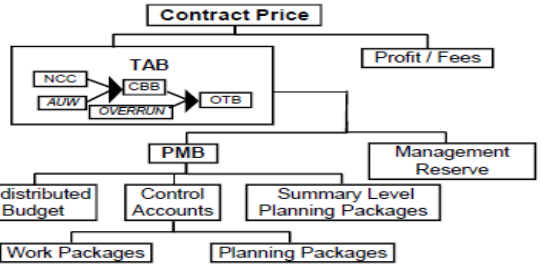
CRITICAL PATH LENGTH INDEX (CPLI) (Schedule Metric)
CPLI = (Critical Path Duration + Float Duration $_{\text{(to baseline finish)}}$) / Critical Path Duration

TO COMPLETE PERFORMANCE INDEX (TCPI) # §
$TCPI_{EAC}$ = Work Remaining / Cost Remaining = (BAC – $BCWP_{CUM}$) / (EAC – $ACWP_{CUM}$)

ESTIMATE AT COMPLETION #

EAC	= Actuals to Date	+ [(Remaining Work) / (Efficiency Factor)]
EAC_{CPI}	= $ACWP_{CUM}$	+ [(BAC – $BCWP_{CUM}$) / CPI_{CUM}] = BAC / CPI_{CUM}
$EAC_{Composite}$	= $ACWP_{CUM}$	+ [(BAC – $BCWP_{CUM}$) / (CPI_{CUM} * SPI_{CUM})]

\# To Determine a Contract Level TCPI or EAC; You May Replace BAC with TAB
§ To Determine the $TCPI_{BAC\ or\ LRE}$ Replace EAC with BAC or LRE



TERMINOLOGY

NCC	Negotiated Contract Cost	Contract price less profit / fee(s)
AUW	Authorized Unpriced Work	Work contractually approved, but not yet negotiated / definitized
CBB	Contract Budget Base	Sum of NCC and AUW
OTB	Over Target Baseline	Sum of CBB and recognized overrun
TAB	Total Allocated Budget	Sum of all budgets for work on contract = NCC, CBB, or OTB
BAC	Budget At Completion	Total budget for total contract thru any given level
PMB	Performance Measurement Baseline	Contract time-phased budget plan
MR	Management Reserve	Budget withheld by Ktr PM for unknowns / risk management
UB	Undistributed Budget	Broadly defined activities not yet distributed to CAs
CA	Control Account	Lowest CWBS element assigned to a single focal point to plan & control scope / schedule / budget
WP	Work Package	Near-term, detail-planned activities within a CA
PP	Planning Package	Far-term CA activities not yet defined into WPs
BCWS	Budgeted Cost for Work Scheduled	Value of work planned to be accomplished = PLANNED VALUE
BCWP	Budgeted Cost for Work Performed	Value of work accomplished = EARNED VALUE
ACWP	Actual Cost of Work Performed	Cost of work accomplished = ACTUAL COST
EAC	Estimate At Completion	Estimate of total cost for total contract thru any given level; may be generated by Ktr, PMO, DCMA, etc. = $EAC_{Ktr\ /\ PMO\ /\ DCMA}$
LRE	Latest Revised Estimate	Ktr's EAC or EAC_{Ktr}
SLPP	Summary Level Planning Package	Far-term activities not yet defined into CAs
TCPI	To Complete Performance Index	Efficiency needed from 'time now' to achieve an EAC

EVM POLICY: **DoDI 5000.02, Encl 4. Table 5. EVMS in accordance with ANSI/EIA-748 is required for cost or incentive contracts, subcontracts, intra-government work agreements, & other agreements valued ≥ $20M (Then-Yr $). EVMS contracts ≥ $50M (TY $) require that the EVM system be formally validated by the cognizant contracting officer. Additional Guidance in Defense Acquisition Guidebook and the Earned Value Management Implementation Guide (EVMIG). EVMS is discouraged on Firm-Fixed Price, Level of Effort, & Time & Material efforts regardless of cost.**

EVM CONTRACTING REQUIREMENTS:

Non-DoD FAR Clauses – Solicitation – 52.234-2 (Pre-Award IBR) or 52.234-3 (Post Award IBR)
– Solicitation & Contract – 52.234-4

DoD(≥ $20M) DFAR Clauses - 252.234-7001 for solicitations and 252.234-7002 for solicitations & contracts

Contract Performance Report – DI-MGMT-81466A * 5 Formats (WBS, Organization, Baseline, Staffing & Explanation)
Integrated Master Schedule – DI-MGMT-81650 * (Mandatory for DoD EVMS contracts)
Integrated Baseline Review (IBR) – Mandatory for all EVMS contracts
* *See the EVMIG for CPR & IMS tailoring guidance.*

EVM Home Page = https://acc.dau.mil/evm eMail Address: EVM.dau@dau.mil
DAU POC: (703) 805-5259 (DSN 655)
Revised January 2009

DoD TripWire Metrics

- **Primary Trip Wires**

  - System Indicator – EVM System Certification

  - Integrated Baseline Development Indictor – IBR within 6 months of contract award; cost, schedule, & technical risk identified and quantified at IBR

- **Secondary Trip Wires**

  - CPI and SPI – cum index < .95

  - Baseline Execution Index (BEI) = # baseline tasks actually completed/#baseline tasks scheduled for completion; cum index < .95

  - Critical Path Length Index (CPLI) of PMB = (critical path duration + float duration $_{\text{(to baseline finish)}}$)/critical path duration; cum index < .95

  - To Complete Performance Index (TCPI) = Work Remaining/Cost Remaining; CPI to TCPI delta of >10%

  - PMB Revisions – compared to monthly PMB value; delta of >5%

  - Contract Mods – compared to original base value; delta of >10%

Reference: EVM Government-Industry Working Group brief, 21 Feb 2007

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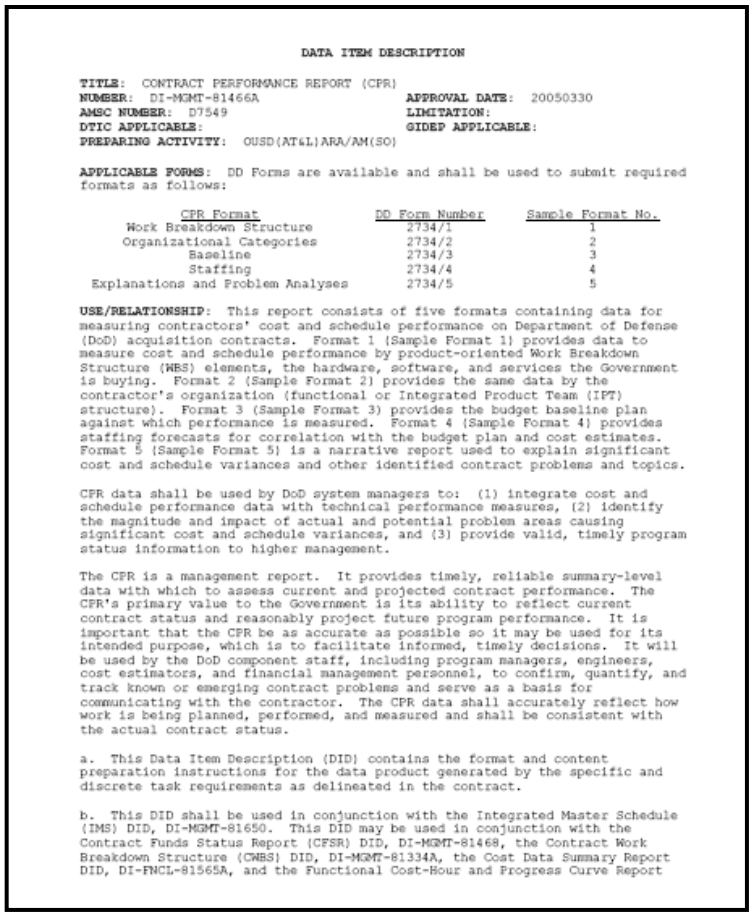
EV DATA ITEMS

Section J – CPR DID DI-MGMT-81466A



DATA ITEM DESCRIPTION

TITLE: CONTRACT PERFORMANCE REPORT (CPR)
NUMBER: DI-MGMT-81466A **APPROVAL DATE:** 20050330
AMSC NUMBER: D7549 **LIMITATION:**
DTIC APPLICABLE: **GIDEP APPLICABLE:**
PREPARING ACTIVITY: OUSD(AT&L)ARA/AM(SO)

APPLICABLE FORMS: DD Forms are available and shall be used to submit required formats as follows:

CPR Format	DD Form Number	Sample Format No.
Work Breakdown Structure	2734/1	1
Organizational Categories	2734/2	2
Baseline	2734/3	3
Staffing	2734/4	4
Explanations and Problem Analyses	2734/5	5

USE/RELATIONSHIP: This report consists of five formats containing data for measuring contractors' cost and schedule performance on Department of Defense (DoD) acquisition contracts. Format 1 (Sample Format 1) provides data to measure cost and schedule performance by product-oriented Work Breakdown Structure (WBS) elements, the hardware, software, and services the Government is buying. Format 2 (Sample Format 2) provides the same data by the contractor's organization (functional or Integrated Product Team (IPT) structure). Format 3 (Sample Format 3) provides the budget baseline plan against which performance is measured. Format 4 (Sample Format 4) provides staffing forecasts for correlation with the budget plan and cost estimates. Format 5 (Sample Format 5) is a narrative report used to explain significant cost and schedule variances and other identified contract problems and topics.

CPR data shall be used by DoD system managers to: (1) integrate cost and schedule performance data with technical performance measures, (2) identify the magnitude and impact of actual and potential problem areas causing significant cost and schedule variances, and (3) provide valid, timely program status information to higher management.

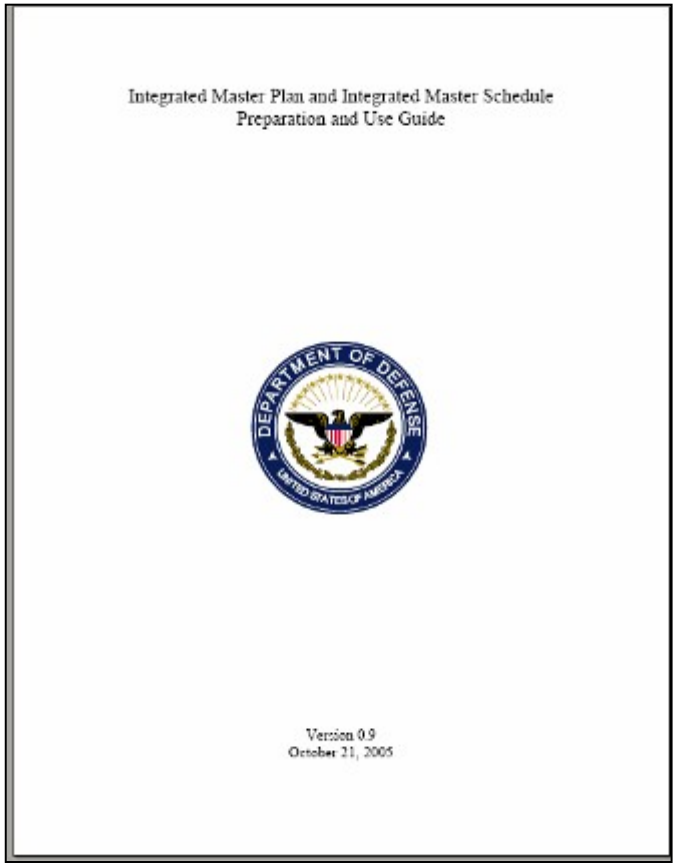
The CPR is a management report. It provides timely, reliable summary-level data with which to assess current and projected contract performance. The CPR's primary value to the Government is its ability to reflect current contract status and reasonably project future program performance. It is important that the CPR be as accurate as possible so it may be used for its intended purpose, which is to facilitate informed, timely decisions. It will be used by the DoD component staff, including program managers, engineers, cost estimators, and financial management personnel, to confirm, quantify, and track known or emerging contract problems and serve as a basis for communicating with the contractor. The CPR data shall accurately reflect how work is being planned, performed, and measured and shall be consistent with the actual contract status.

a. This Data Item Description (DID) contains the format and content preparation instructions for the data product generated by the specific and discrete task requirements as delineated in the contract.

b. This DID shall be used in conjunction with the Integrated Master Schedule (IMS) DID, DI-MGMT-81650. This DID may be used in conjunction with the Contract Funds Status Report (CFSR) DID, DI-MGMT-81468, the Contract Work Breakdown Structure (CWBS) DID, DI-MGMT-81334A, the Cost Data Summary Report DID, DI-FNCL-81565A, and the Functional Cost-Hour and Progress Curve Report

- The CPR consists of five formats
  - Format 1 – Work Breakdown Structure
  - Format 2 – Organizational Categories
  - Format 3 – Baseline
  - Format 4 – Staffing
  - Format 5 – Explanations & Problem Analyses
- Uses of CPR Data
  - Integrated Cost & Schedule EVM Data
  - Identify the cost and schedule impact of actual and potential problems
  - Provide valid, timely program status info for higher management
- The CPR provides timely, reliable summary-level data with which to

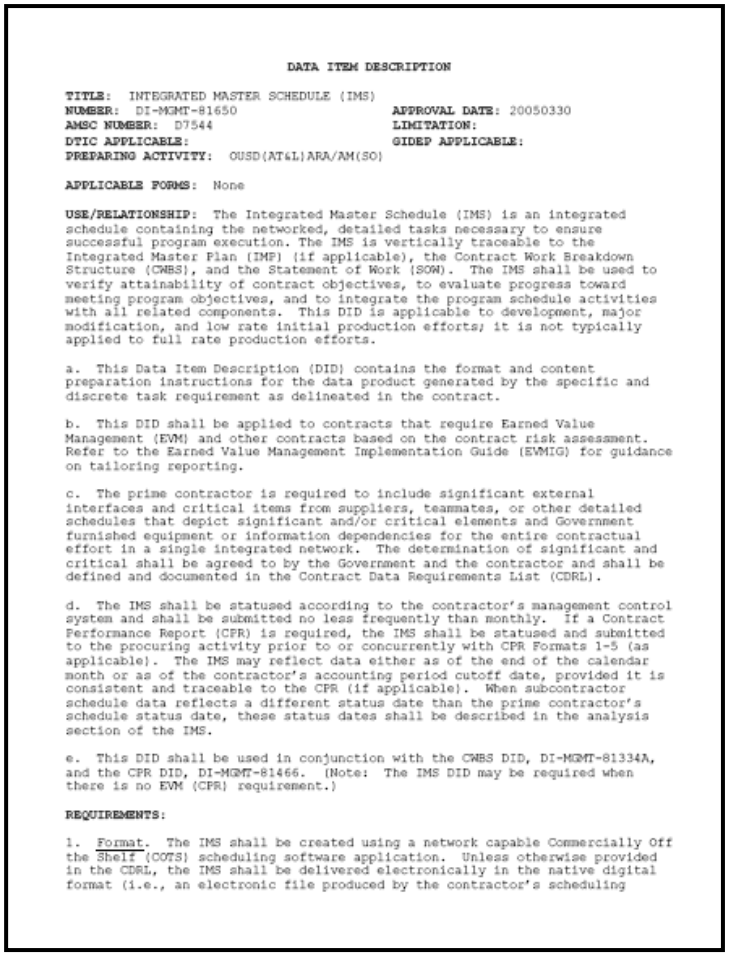
DoD IMP and IMS Guidance


Integrated Master Plan and Integrated Master Schedule
Preparation and Use Guide

Version 0.9
October 21, 2005

- **Specification of an Integrated Master Schedule (IMS) and Integrated Master Plan (IMP) is the government's responsibility**
- **Requirement for an IMS and IMP should be called out in the contract statement of work**
  - **Pursuant to** DFARS **clause 252.234-7002 EVMS criteria**
  - **Invoke CDRL referencing** DID **for Integrated Master Schedule (DI-MGMT-81650)**
  - **Reference** DoD IMP Guidebook**, dated October 2005**
- **Integrated Master Schedule should be applied to all projects in all phases of development through** low rate production**, it is not typically applied to** full rate production **efforts**

Section J – IMS DID DI-MGMT-81650



DATA ITEM DESCRIPTION

TITLE: INTEGRATED MASTER SCHEDULE (IMS)
NUMBER: DI-MGMT-81650 **APPROVAL DATE:** 20050330
AMSC NUMBER: D7544 **LIMITATION:**
DTIC APPLICABLE: **GIDEP APPLICABLE:**
PREPARING ACTIVITY: OUSD(AT&L)ARA/AM(SO)

APPLICABLE FORMS: None

USE/RELATIONSHIP: The Integrated Master Schedule (IMS) is an integrated schedule containing the networked, detailed tasks necessary to ensure successful program execution. The IMS is vertically traceable to the Integrated Master Plan (IMP) (if applicable), the Contract Work Breakdown Structure (CWBS), and the Statement of Work (SOW). The IMS shall be used to verify attainability of contract objectives, to evaluate progress toward meeting program objectives, and to integrate the program schedule activities with all related components. This DID is applicable to development, major modification, and low rate initial production efforts; it is not typically applied to full rate production efforts.

a. This Data Item Description (DID) contains the format and content preparation instructions for the data product generated by the specific and discrete task requirement as delineated in the contract.

b. This DID shall be applied to contracts that require Earned Value Management (EVM) and other contracts based on the contract risk assessment. Refer to the Earned Value Management Implementation Guide (EVMIG) for guidance on tailoring reporting.

c. The prime contractor is required to include significant external interfaces and critical items from suppliers, teammates, or other detailed schedules that depict significant and/or critical elements and Government furnished equipment or information dependencies for the entire contractual effort in a single integrated network. The determination of significant and critical shall be agreed to by the Government and the contractor and shall be defined and documented in the Contract Data Requirements List (CDRL).

d. The IMS shall be statused according to the contractor's management control system and shall be submitted no less frequently than monthly. If a Contract Performance Report (CPR) is required, the IMS shall be statused and submitted to the procuring activity prior to or concurrently with CPR Formats 1-5 (as applicable). The IMS may reflect data either as of the end of the calendar month or as of the contractor's accounting period cutoff date, provided it is consistent and traceable to the CPR (if applicable). When subcontractor schedule data reflects a different status date than the prime contractor's schedule status date, these status dates shall be described in the analysis section of the IMS.

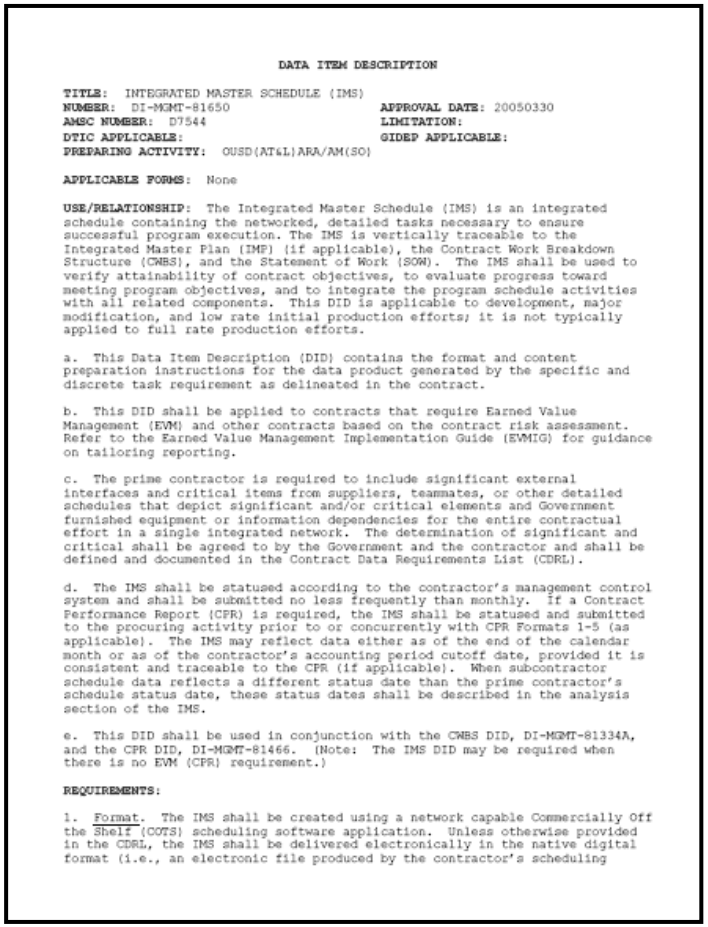
e. This DID shall be used in conjunction with the CWBS DID, DI-MGMT-81334A, and the CPR DID, DI-MGMT-81466. (Note: The IMS DID may be required when there is no EVM (CPR) requirement.)

REQUIREMENTS:

1. Format. The IMS shall be created using a network capable Commercially Off the Shelf (COTS) scheduling software application. Unless otherwise provided in the CDRL, the IMS shall be delivered electronically in the native digital format (i.e., an electronic file produced by the contractor's scheduling

- IMS shall include **all** discrete tasks/activities, work packages, and planning packages identified in the contract Performance Measurement Baseline (PMB)
- IMS shall identify "significant" external dependencies (i.e. GFE, test facilities)
  - Suppliers and government playing a bigger role in producing products
- IMS shall be statused and submitted prior to or concurrently with Contract Performance Report (CPR)
- Standard scheduling definitions

Section J - IMS DID DI-MGMT-81650 (cont)



DATA ITEM DESCRIPTION

TITLE: INTEGRATED MASTER SCHEDULE (IMS)
NUMBER: DI-MGMT-81650 **APPROVAL DATE:** 20050330
AMSC NUMBER: D7544 **LIMITATION:**
DTIC APPLICABLE: **GIDEP APPLICABLE:**
PREPARING ACTIVITY: OUSD(AT&L)ARA/AM(SO)

APPLICABLE FORMS: None

USE/RELATIONSHIP: The Integrated Master Schedule (IMS) is an integrated schedule containing the networked, detailed tasks necessary to ensure successful program execution. The IMS is vertically traceable to the Integrated Master Plan (IMP) (if applicable), the Contract Work Breakdown Structure (CWBS), and the Statement of Work (SOW). The IMS shall be used to verify attainability of contract objectives, to evaluate progress toward meeting program objectives, and to integrate the program schedule activities with all related components. This DID is applicable to development, major modification, and low rate initial production efforts; it is not typically applied to full rate production efforts.

a. This Data Item Description (DID) contains the format and content preparation instructions for the data product generated by the specific and discrete task requirement as delineated in the contract.

b. This DID shall be applied to contracts that require Earned Value Management (EVM) and other contracts based on the contract risk assessment. Refer to the Earned Value Management Implementation Guide (EVMIG) for guidance on tailoring reporting.

c. The prime contractor is required to include significant external interfaces and critical items from suppliers, teammates, or other detailed schedules that depict significant and/or critical elements and Government furnished equipment or information dependencies for the entire contractual effort in a single integrated network. The determination of significant and critical shall be agreed to by the Government and the contractor and shall be defined and documented in the Contract Data Requirements List (CDRL).

d. The IMS shall be statused according to the contractor's management control system and shall be submitted no less frequently than monthly. If a Contract Performance Report (CPR) is required, the IMS shall be statused and submitted to the procuring activity prior to or concurrently with CPR Formats 1-5 (as applicable). The IMS may reflect data either as of the end of the calendar month or as of the contractor's accounting period cutoff date, provided it is consistent and traceable to the CPR (if applicable). When subcontractor schedule data reflects a different status date than the prime contractor's schedule status date, these status dates shall be described in the analysis section of the IMS.

e. This DID shall be used in conjunction with the CWBS DID, DI-MGMT-81334A, and the CPR DID, DI-MGMT-81466. (Note: The IMS DID may be required when there is no EVM (CPR) requirement.)

REQUIREMENTS:

1. Format. The IMS shall be created using a network capable Commercially Off the Shelf (COTS) scheduling software application. Unless otherwise provided in the CDRL, the IMS shall be delivered electronically in the native digital format (i.e., an electronic file produced by the contractor's scheduling

- **Critical Path** calculated by software
  - **Total Program Critical Path from beginning to end**
  - **Software can not be specified but must meet DI-MGMT-81650 requirements**
  - **Examples of available software tools**
    - **Open Plan Professional**
    - **Primavera**
    - **MS Project**
- **Schedule Risk Assessments** are to be submitted as specified in the CDRL and prior to the Integrated Baseline Review (IBR)
- **Float/Slack** is an asset of the program and not for the exclusive use or benefit of the government
- **Monthly analysis** is required in order to identify potential problems and an assessment of the critical path and near-critical paths

Defense Acquisition University

EVMS Training and References

DAU Acquisition Community Connection

EVMS Training—DAU Continuous Learning Modules

All | CLB | CLC | CLE | CLG | CLI | CLL | CLM | FAC | SPS | External

Prefix	Course Name
CLB014	Acquisition Reporting Concepts and Policy Requirements for APB, DAES, and SAR
CLB020	Baseline Maintenance
CLB011	Budget Policy
CLB010	Congressional Enactment
CLB007	Cost Analysis
CLB024	Cost Risk Analysis Introduction
CLB012	Cost as an Independent Variable
CLB018	Earned Value and Financial Management Reports
CLB019	Estimate at Completion
CLB016	Introduction to Earned Value Management
CLB017	Performance Measurement Baseline
CLB009	Planning, Programming, Budgeting, and Execution (PPBE) and Budget Exhibits
CLB008	Program Execution
CLB023	Software Cost Estimating

https://learn.dau.mil/html/clc/Clc1.jsp?cl=

EVMS Tailored Training

- DAU can provide targeted training
  - Tailored to specific organization needs
  - Part of our Consulting/Performance Support efforts

- Potential Topics
  - Integrated Baseline Review Workshop
  - Program Startup Workshop
  - EVMS Basics/Intermediate
  - Scheduling Basics/Intermediate
  - Source Selection

- For More Info, Contact: Professor Kim Meyer
  - 937-781-1040, kimberly.meyer@dau.mil

- BACKUPS

CONTRACT PERFORMANCE REPORT
FORMAT 1 – WORK BREAKDOWN STRUCTURE

DOLLARS IN Thousands

Form Approved
OMB No. 0704-0188

The public reporting burden for this collection of information is estimated to be 3.1 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense Washington Headquarters Services Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number.
PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. SUBMIT COMPLETED FORMS IN ACCORDANCE WITH CONTRACTUAL REQUIREMENTS.

1. CONTRACTOR	2. CONTRACT	3. PROGRAM	4. REPORT PERIOD
a. NAME CyboRaptor	a. NAME FIREBIRD II	a. NAME FIREBIRD II	a. FROM (YYYYMMDD) YYYY0601
b. LOCATION (Address and ZIP Code) 1100 Carey Ave Waynesville VA 21345	b. NUMBER FDS601-20006C-DO23	b. PHASE RDT&E	b. TO (YYYYMMDD) YYYY0630
	c. TYPE CPIF / d. SHARE RATIO 70/30	c. EVMS ACCEPTANCE N / A	

5. CONTRACT DATA

a. QUANTITY	b. NEGOTIATED COST	c. ESTIMATED COST OF AUTHORIZED UNPRICED WORK	d. TARGET PROFIT/ FEE	e. TARGET PRICE	f. ESTIMATED PRICE	h. ESTIMATED CONTRACT CEILING	i. DATE OF OTB/OTS (YYYYMMDD)
N / A	$23,000.00	0.00	$2,737 / 11.9%	$25,737 20	$25,167.20	$28,310.70	

6. ESTIMATED COST AT COMPLETION

	MANAGEMENT ESTIMATE AT COMPLETION (1)	CONTRACT BUDGET BASE (2)	VARIANCE (3)
a. BEST CASE	$21,160.00		
b. WORST CASE	$23,000.00		
c. MOST LIKELY	$22,187.10	$23,000.00	$474.00

7. AUTHORIZED CONTRACTOR REPRESENTATIVE

a. NAME (Last, First, Middle Initial) | b. TITLE | c. SIGNATURE | d. DATE SIGNED (YYYYMMDD)

7. PERFORMANCE DATA

ITEM (1)		CURRENT PERIOD: BUDGETED COST WORK SCHEDULED (2)	BUDGETED COST WORK PERFORMED (3)	ACTUAL COST WORK PERFORMED (4)	VARIANCE SCHEDULE (5)	VARIANCE COST (6)	CUMULATIVE TO DATE: BUDGETED COST WORK SCHEDULED (7)	BUDGETED COST WORK PERFORMED (8)	ACTUAL COST WORK PERFORMED (9)	VARIANCE SCHEDULE (10)	VARIANCE COST (11)	REPROGRAMMING ADJUSTMENTS: COST VARIANCE (12a)	SCHEDULE VARIANCE (12b)	BUDGET (13)	AT COMPLETION: BUDGETED (14)	ESTIMATED (15)	VARIANCE (16)
1.1 Air Vehicle	2	**1,423.47**	**1,295.97**	**1,455.93**	**-127.50**	**-159.97**	**4,270.40**	**3,887.90**	**4,367.80**	**382.50**	**-479.90**				**11,588.10**	**11,246.80**	**341.30**
1.1.1 Weapons Delivery	3	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**				**0.00**	**0.00**	**0.00**
1.1.2 Airframe	3	**62.00**	**65.00**	**64.33**	**3.00**	**0.67**	**186.00**	**195.00**	**193.00**	**9.00**	**2.00**				**649.70**	**634.00**	**15.70**
1.1.3 Engine	3	**732.83**	**557.67**	**811.10**	**-175.17**	**-253.43**	**2,198.50**	**1,673.00**	**2,318.40**	**525.50**	**-645.40**				**5,892.00**	**5,729.90**	**162.10**
1.1.4 C2 System	3	**111.47**	**124.51**	**106.60**	**13.04**	**17.91**	**334.40**	**368.90**	**319.80**	**34.50**	**49.10**				**896.20**	**847.10**	49.10
1.1.4.1 Radio	4	70.00	73.21	68.00	3.21	5.21	210.00	215.00	204.00	5.00	11.00				562.80	552.70	10.10
1.1.4.2 TV Camera	4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00				0.00	0.00	0.00
1.1.4.3 Avionics	4	41.47	51.30	38.60	9.83	12.70	124.40	153.90	115.80	29.50	38.10				333.40	294.40	39.00
1.1.5 Self Defense	3	**517.17**	**550.33**	**512.20**	**33.17**	**38.13**	**1,551.50**	**1,651.00**	**1,536.60**	**99.50**	**114.40**				**4,150.20**	4,035.80	114.40
1.1.5.1 Flares	4	184.37	200.87	181.87	16.50	19.00	553.10	602.60	545.60	49.50	57.00				1,482.30	1,425.30	57.00
1.1.5.2 Flight Control	4	282.87	297.03	280.80	14.17	16.23	848.60	891.10	842.40	42.50	48.70				2,267.70	2,218.50	49.20
1.1.5.3 Sensor	4	49.93	52.43	49.53	2.50	2.90	149.80	157.30	148.60	7.50	8.70				400.20	392.00	8.20
1.2 Grnd Cont. Termina	2	**395.97**	**408.73**	**394.17**	**12.77**	**14.57**	**1,200.50**	**1,226.20**	**1,182.50**	**25.70**	**43.70**				**3,402.50**	**3,301.00**	**101.50**
1.2.1 Radio	3	183.50	183.57	183.47	.07	0.10	550.50	550.70	550.40	0.20	0.30				1,660.50	1,561.00	99.50
1.2.2 Control Software	3	216.67	225.17	210.70	8.5	14.47	650.00	675.50	632.10	25.5	43.40				1,742.00	1,740.00	
1.2.3 TV	3	0.00	0.00	0.0 0	0.00	0.00	0.00	0.00	0.00	0.00	0.00				0.00	0.00	2000

CONTRACT PERFORMANCE REPORT

DOLLARS IN Thousands

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7. PERFORMANCE DATA

ITEM (1)		CURRENT PERIOD: BUDGETED COST WORK SCHEDULED (2)	CURRENT PERIOD: BUDGETED COST WORK PERFORMED (3)	CURRENT PERIOD: ACTUAL COST WORK PERFORMED (4)	CURRENT PERIOD: VARIANCE SCHEDULE (5)	CURRENT PERIOD: VARIANCE COST (6)	CUMULATIVE TO DATE: BUDGETED COST WORK SCHEDULED (7)	CUMULATIVE TO DATE: BUDGETED COST WORK PERFORMED (8)	CUMULATIVE TO DATE: ACTUAL COST WORK PERFORMED (9)	CUMULATIVE TO DATE: VARIANCE SCHEDULE (10)	CUMULATIVE TO DATE: VARIANCE COST (11)	REPROGRAMMING ADJUSTMENTS: COST VARIANCE (12a)	REPROGRAMMING ADJUSTMENTS: SCHEDULE VARIANCE (12b)	REPROGRAMMING ADJUSTMENTS: BUDGET (13)	AT COMPLETION: BUDGETED (14)	AT COMPLETION: ESTIMATED (15)	AT COMPLETION: VARIANCE (16)
a. WORK BREAKDOWN STRUCTURE ELEMENT (continued)																	
1.3 Launcher	**2**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.0**	**0.0**	**0.00**				**0.00**	**0.0**	**0.00**
1.4 Sys Program Mgmt	**2**	**431.47**	**395.23**	**443.43**	**-36.23**	**-67.10**	**1,294.40**	**1,185.70**	**1,390.30**	**-108.30**	**144.60**				**5,178.60**	**5,282.50**	**-103.90**
1.4.1 Project Mgmt	3	136.07	136.07	142.33	0.00	-6.27	408.20	408.20	427.00	0.00	-18.80				1,473.00	1,483.20	-10.20
1.4.2 Sys Engineering	3	295.40	259.17	320.00	-36.23	-60.83	886.20	777.50	903.30	-108.70	-125.80				3,705.60	3,799.30	-93.70
1.5 Sys Test & Evaluation	**2**	**88.37**	**74.67**	**84.84**	**-13.70**	**-6.17**	**265.10**	**224.00**	**253.20**	**-41.10**	**-29.20**				**863.30**	**868.40**	**-5.10**
1.5.1 Dev Test & Evaluation	3	48.03	40.73	44.30	-7.30	-3.57	144.10	122.20	132.90	-21.90	-10.70				489.70	504.90	-15.20
1.5.2 Oper T&E Support	3	18.43	17.60	18.37	-0.83	-0.77	55.30	52.80	55.10	-2.50	-2.30				144.00	141.20	2.80
1.5.3 Mock-Ups	3	21.90	21.90	21.73	0.00	0.17	65.70	49.00	65.20	-16.70	-16.20				229.60	222.30	7.30
1.6 Sys Data	**2**	**29.40**	**28.03**	**29.27**	**-1.36**	**-1.23**	**88.20**	**84.10**	**87.80**	**-4.10**	**-3.70**				**296.70**	**306.20**	**-9.50**
1.6.1 Eng Data	3	13.57	13.30	9.40	-0.27	3.90	40.70	39.90	28.20	-0.80	11.70				202.50	193.30	9.20
1.6.2 Mgmt Data	3	15.83	14.73	19.87	-1.10	-5.13	47.50	44.20	59.60	-3.30	-15.40				94.20	112.90	-18.70
1.7 Pec Support Equip	**2**	**55.70**	**52.57**	**62.40**	**-3.13**	**-9.83**	**167.10**	**157.70**	**187.20**	**-9.40**	**-29.50**				**498.60**	**537.20**	**-38.60**
1.7.1 Test & Measure	3	22.83	23.97	32.30	1.13	-8.33	68.50	71.90	96.90	3.40	-25.00				279.40	322.90	-43.50
1.7.2 Support & Handling	3	32.87	28.60	30.10	-4.27	-1.50	98.60	85.80	90.30	-12.80	-4.50				219.20	214.30	4.90
1.8 Common Supt Equip	**2**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**				**0.00**	**0.00**	**0.00**
1.9 Spares & Rep	**2**	**3.57**	**3.30**	**3.03**	**-0.27**	**0.27**	**10.70**	**9.90**	**9.10**	**-0.80**	**0.80**				**642.20**	**645.00**	**-2.80**
b. COST OF MONEY		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0 0				0.00	0.0 0	0.00
c. G & A (Non- Add)		320.33	296.17	306.87	-24.17	-10.70	961.00	888.50	920.60	-72.50	-32.10				2953.90	2916.71	37.19
d. UNDISTRIBUTED BUDGET															0.0 0	0.0 0	0.00
e. SUBTOTAL (Performance Measurement Baseline)		2,427.93	2,258.50	2,469.07	-169.43	-210.57	7,296.40	6,775.50	7,417.90	-520.50	-642.40				22,470.00	22,187.10	282.90
f. MANAGEMENT RESERVE															530.00		
g. TOTAL		2,427.93	2,258.50	2,469.07	-169.43	-210.57	7,296.40	6,775.50	7,417.90	-520.50	-642.40				23,000.00	22,187.10	812.90

9. RECONCILIATION TO CONTRACT BUDGET BASE

a. VARIANCE ADJUSTMENT										0.00	0.0 0						0.0 0
b. TOTAL CONTRACT VARIANCE										-520.50	-642.40						812.90

DD FORM 2734/1 MAR 05

LOCAL REPRODUCTION AUTHORIZED.

CONTRACT PERFORMANCE REPORT
FORMAT 2 - ORGANIZATIONAL CATEGORIES

DOLLARS IN: Thousands

1. CONTRACTOR	2. CONTRACT		3. PROGRAM	4. REPORT PERIOD
a. NAME Increda, Corp	a. NAME LAR DEC 2003		a. NAME LAR Vehicle	a. FROM *(CCYYMMDD)* 20031129
b. LOCATION *(Address and ZIP code)* 1100 W. HOLLYMOLLY ST. LOS ANGELES, CA 90293	b. NUMBER DAAH01-03-C-0076			b. TO *(CCYYMMDD)* 20031231
	c. TYPE CPIF	d. SHARE RATIO 50/50 30/70	b. PHASE *(X one)* x RDT&E ☐ PRODUCTION	

5. PERFORMANCE DATA

ITEM		CURRENT PERIOD					CUMULATIVE TO DATE					REPROGRAM ADJUSTMENTS		AT COMPLETION		
		BUDGETED COST		ACTUAL	VARIANCE		BUDGETED COST		ACTUAL	VARIANCE						
		WORK SCHEDULED	WORK PERFORMED	COST WORK PERFORMED	SCHEDULE	COST	WORK SCHEDULED	WORK PERFORMED	COST WORK PERFORMED	SCHEDULE	COST	COST VARIANCE	BUDGET	BUDGETED	ESTIMATED	VARIANCE
(1)		(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)
a. ORGANIZATIONAL CATEGORY																
2A - PROGRAM OFFICE	2	167.0	167.0	155.4	0.0	11.6	1,090.5	1,090.5	901.0	0.0	189.5			5,009.4	5,009.4	0.0
2B - PROGRAM CONTROL	2	109.5	109.5	72.6	0.0	36.9	645.8	645.8	483.2	0.0	162.6			2,191.6	2,191.6	0.0
2C - SUPPORT SERVICE	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			1,252.3	1,252.3	0.0
2D - MANUFACTURING	2	375.7	375.7	405.9	0.0	-30.2	1,351.3	1,351.3	1,378.6	0.0	-27.3			18,785.2	18,785.2	0.0
2E - QUAL ASSURANCE	2	37.5	37.5	45.0	0.0	-7.5	135.1	135.1	140.3	0.0	-5.2			1,878.5	1,878.5	0.0
2F - PROCUREMENT	2	392.6	392.6	382.3	0.0	10.3	1,894.7	1,894.7	1,876.7	0.0	18.0			11,897.3	11,747.5	149.8
2G - ENGINEERING	2	953.6	503.3	1,031.7	-450.3	-528.4	6,077.8	4,798.4	5,945.8	-1,279.4	-1,147.4			21,603.0	21,603.0	0.0
[OH] - OVERHEAD	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			0.0	0.0	0.0
b. COST OF MONEY	2	15.2	12.5	39.0	-2.7	-26.5	151.0	149.0	162.2	-2.0	-13.2			821.8	821.8	0.0
c. GENERAL & ADMINISTRATIVE	N 2	148.2	121.0	192.6	-27.2	-71.6	1,450.6	1,437.7	1,558.4	-12.9	-120.7			8,462.7	8,450.8	11.9
d. UNDISTRIBUTED BUDGET	2													0.0	0.0	0.0
e. SUBTOTAL *(Performance Measurement Baseline)*		2,051.1	1,598.1	2,131.9	-453.0	-533.8	11,346.2	10,064.8	10,887.8	-1,281.4	-823.0	0.0	0.0	63,439.1	63,289.3	149.8
f. MANAGEMENT RESERVE	2												0.0	1,272.3		
g. TOTAL		2,051.1	1,598.1	2,131.9	-453.0	-533.8	11,346.2	10,064.8	10,887.8	-1,281.4	-823.0	0.0	0.0	64,711.4		

CONTRACT PERFORMANCE REPORT
FORMAT 3 - BASELINE

DOLLARS IN: Thousands

1. CONTRACTOR	2. CONTRACT	3. PROGRAM	4. REPORT PERIOD
a. NAME Increda, Corp	a. NAME LAR DEC 2003	a. NAME LAR Vehicle	a. FROM *(CCYYMMDD)* 20031129
b. LOCATION *(Address and ZIP code)* 1100 W. HOLLYMOLLY ST. LOS ANGELES, CA 90293	b. NUMBER DAAH01-03-C-0076		b. TO *(CCYYMMDD)* 20031231
	c. TYPE CPIF — d. SHARE RATIO 50/50 30/70	b. PHASE *(X one)* x RDT&E — ☐ PRODUCTION	

5. CONTRACT DATA

a. ORIGINAL NEGOTIATED COST	b. NEGOTIATED CONTRACT CHANGES	c. CURRENT NEGOTIATED COST *(a. + b.)*	d. ESTIMATED COST OF AUTHORIZED UNPRICED WORK	e. CONTRACT BUDGET BASE *(c. + d.)*	f. TOTAL ALLOCATED BUDGET	g. DIFFERENCE *(e. - f.)*
$64,711.0	$0.0	$64,711.5	$0.0	$64,711.5	$64,711.5	$0.0

h. CONTRACT START DATE *(CCYYMMDD)*	i. CONTRACT DEFINITIZATION DATE *(CCYYMMDD)*	j. PLANNED COMPLETION DATE *(CCYYMMDD)*	k. CONTRACT COMPLETION DATE *(CCYYMMDD)*	l. ESTIMATED COMPLETION DATE *(CCYYMMDD)*
20030602	20030610	20060530	20060531	20060530

6. PERFORMANCE DATA

ITEM	BCWS CUMULATIVE TO DATE	BCWS FOR REPORT PERIOD	BUDGETED COST FOR WORK SCHEDULED (BCWS) *(Non-Cumulative)* — SIX MONTH FORECAST						ENTER SPECIFIED PERIODS					UNDISTRIB BUDGET	TOTAL BUDGET
			+1 JAN	+2 FEB	+3 MAR	+4 APR	+5 MAY	+6 JUN	FY04	FY05			TC		
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)
a. PERFORMANCE MEASUREMENT BASELINE *(Beginning of Period)*	9,295.0	2,095.5	1,742.3	1,793.8	1,800.8	1,762.5	1,803.7	1,830.1	5,202.2	20,452.3	0.0	0.0	15,679.3	0.0	63,457.5
b. BASELINE CHANGES AUTHORIZED DURING REPORT PERIOD															
c. PERFORMANCE MEASUREMENT BASELINE *(End of Period)*	11,346.3		2,224.5	1,777.3	1,757.4	1,750.4	1,777.4	1,775.0	5,408.2	19,626.5	0.0	0.0	15,996.1	0.0	63,439.1
7. MANAGEMENT RESERVE															1,272.3
8. TOTAL															64,711.4

CONTRACT PERFORMANCE REPORT
FORMAT 4 - STAFFING (BAC)

1. CONTRACTOR	2. CONTRACT		3. PROGRAM	4. REPORT PERIOD
a. NAME Increda, Corp	a. NAME LAR DEC 2003		a. NAME LAR Vehicle	a. FROM *(CCYYMMDD)* 20031129
b. LOCATION *(Address and ZIP code)* 1100 W. HOLLYMOLLY ST. LOS ANGELES, CA 90293	b. NUMBER DAAH01-03-C-0076			b. TO *(CCYYMMDD)* 20031231
	c. TYPE CPIF	d. SHARE RATIO 50/50 30/70	b. PHASE *(X one)* x RDT&E ☐ PRODUCTION	

5. PERFORMANCE DATA

ORGANIZATIONAL CATEGORY		PLANNED CURRENT PERIOD	PLANNED END OF CURRENT PERIOD *(Cum)*	FORECAST *(Non-Cumulative)* — SIX MONTH FORECAST *(Enter Names of Months)*						ENTER SPECIFIED PERIODS					AT COMPLETION
				JAN	FEB	MAR	APR	MAY	JUN	FY04	FY06			TC	
(1)		(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)
2A - PROGRAM OFFICE	2	12.5	81.4	12.5	12.5	12.5	12.5	12.5	12.5	28.4	113.5	0.0	0.0	75.7	374.0
2B - PROGRAM CONTROL	2	8.2	48.2	8.2	8.2	8.2	8.2	5.5	5.4	9.4	37.4	0.0	0.0	24.9	163.6
2C - SUPPORT SERVICE	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	17.5	70.0	0.0	0.0	46.7	134.2
2D - MANUFACTURING	2	30.9	110.7	30.8	30.8	30.8	15.4	15.4	15.4	170.3	681.0	0.0	0.0	454.0	1,554.6
2E - QUAL ASSURANCE	2	4.6	16.5	4.6	4.6	4.6	2.3	2.3	2.3	25.4	101.6	0.0	0.0	67.8	232.0
2F - PROCUREMENT	2	5.4	26.2	5.4	5.4	5.4	5.4	5.4	5.4	13.8	55.1	0.0	0.0	36.7	164.2
2G - ENGINEERING	2	84.9	368.0	99.2	124.2	135.5	224.1	114.1	69.7	60.4	241.6	0.0	0.0	161.1	1,597.9
6. TOTAL DIRECT		146.5	651.0	160.7	185.7	197.0	267.9	155.2	110.7	325.2	1,300.2	0.0	0.0	866.9	4,220.5

CONTRACT FUNDS STATUS REPORT (*Dollars in* **000**)

Form Approved
OMB No. 0704-0188

The public reporting burden for this collection of information is estimated to average 8 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE ABOVE ADDRESS.

1. CONTRACT NUMBER	3. CONTRACT FUNDING FOR	5. PREVIOUS REPORT DATE	7. CONTRACTOR (*Name, address and zip code*)	9. INITIAL CONTRACT PRICE
DAAH01-03-C-0076	INC FOR FY 03 - 06	03-09-30	Increda Corporation 1100 W. Hollymolly St Los Angeles, CA 90293	a. TARGET $72,412.2 b. CEILING $75,475.7
2. CONTRACT TYPE	**4. APPROPRIATION**	**6. CURRENT REPORT DATE**	**8. PROGRAM**	**10. ADJUSTED CONTRACT PRICE**
CPIF	RDT&E	03-12-31	LAR SDD 2003	a. TARGET $72,412.2 b. CEILING $75,475.7

11. FUNDING INFORMATION

LINE ITEM/WBS ELEMENT	APPRO-PRIATION IDENTI-FICATION	FUNDING AUTHORIZED TO DATE	ACCRUED EXPENDITURES OPEN COMMITMENTS TOTAL	CONTRACT WORK AUTHORIZED			FORECAST			TOTAL REQUIRE-MENTS	FUNDS CARRY-OVER	NET FUNDS REQUIRED
				DEFINITIZED	NOT DEFINITIZED	SUBTOTAL	NOT YET AUTHORIZED	ALL OTHER WORK	SUBTOTAL			
a	b	c	d	e	f	g	h	i	j	k	l	m
LAR SDD	2040	20473	13548	72412	0	72412	0	0	0	72412	0	72412

12. CONTRACT WORK AUTHORIZED (*With Fee/Profit*) **- ACTUAL OR PROJECTED**

	ACTUAL TO DATE	04-01-30	04-02-27	04-03-26	04-07-02	04-09-30	05-09-30			AT COMPLETION
a. OPEN COMMITMENTS	1365	1320	1295	1223	2825	1263	0			0
b. ACCRUED EXPENDITURES	12183	15422	17668	19141	27519	34738	60942			72413
c. TOTAL (*12a + 12b*)	13548	16742	18963	20364	30344	36001	60942			72413
13. FORECAST OF BILLINGS TO THE GOVERNMENT	8756	2384	3240	2513	7870	6820	18237			72413
14. ESTIMATED TERMINATION COSTS	10942	13211	11846	11367	13961	12196	9906			0

15. REMARKS

Section J - CPR Tailoring

- **CPRs must be tailored to meet the needs of each individual contract**

- **Tailoring usually involves the following**
  - **Reporting levels, Defining future periods, Specific items of interest, Variance reporting thresholds**

- **Reporting Levels**
  - **WBS/OBS reporting levels on Formats 1 & 2 should be defined**
  - **Typically to level 3 of the CWBS**
  - **High risk elements should be identified for reporting (below level 3)**
  - **CCDR and CPR should use a common WBS. CPR allows for tailoring below the CCDR reporting level**

- **Future periods**
  - **Formats 3 & 4 show the PMB and staffing forecast respectively**
  - **Periods need to be defined in CDRL, identifying months, quarters, years, or combination**
  - **Typically the first 6 columns identify the upcoming 6 months**

Section J - CPR Tailoring (cont'd)

- **Format 5 Narrative Analysis Reporting Thresholds**
  - **Format 1/2 CV, SV, VAC- e.g. top 5 variances that exceed a dollar threshold/percentage threshold. (i.e. $1M or 5%)**
  - **Format 3/4 changes from the previous period that exceed specified percentage**
  - **Using condition statements such as "and" or "or" will affect the number of variances reported to the customer (e.g. $1M and 5% vs $1M or 5%)**
  - **May identify a fixed number of variances (i.e. top 5 variances by WBS Level 2 item)**
  - **Reporting thresholds can vary greatly depending on the size, complexity, and risk of the program**

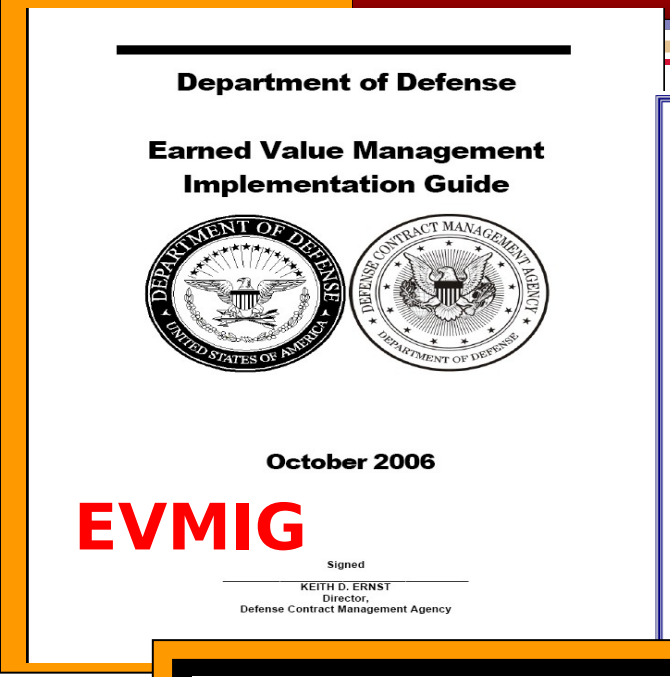
Section J - IMS Tailoring

- Factors to consider when tailoring requirements:
  - Program risk should be prime consideration
  - Contract type, Size of contract, Technology maturity
  - Complexity of integration, e.g. multiple subcontractors, GFE/GFP
- Reporting Frequency
  - Status as of end of calendar/accounting month; be consistent with CPR
  - Cost/Incentive efforts typically reported monthly and must be consistent with CPR
  - FFP efforts may have less frequent reporting than cost/incentive contracts
- Variance Analysis Reporting
  - Schedule variance thresholds for task on the critical path and near critical paths usually expressed in calendar/work days
  - Projected Start / Finish variances for major milestones
  - Narratives discussing next contractual milestone

Section J - IMS Tailoring (cont'd)

- Level of detail of schedule can be tailored based on program risk
- Subcontractor IMS deliverable
- Schedule Risk Assessment
  - Quarterly, Semi-annually, selected key milestones (PDR, CDR, Flight Test)
  - LRIP may only warrant at program start
  - FFP environment; Waive requirement for SRA or less frequent than Cost/Incentive efforts
- Electronic Data Interchange
  - Delivered in native digital format Contractor's schedule tool (MS Project, Primavera, Open Plan, etc)
- Additional guidance can be found in the EVMIG

ACC Included References

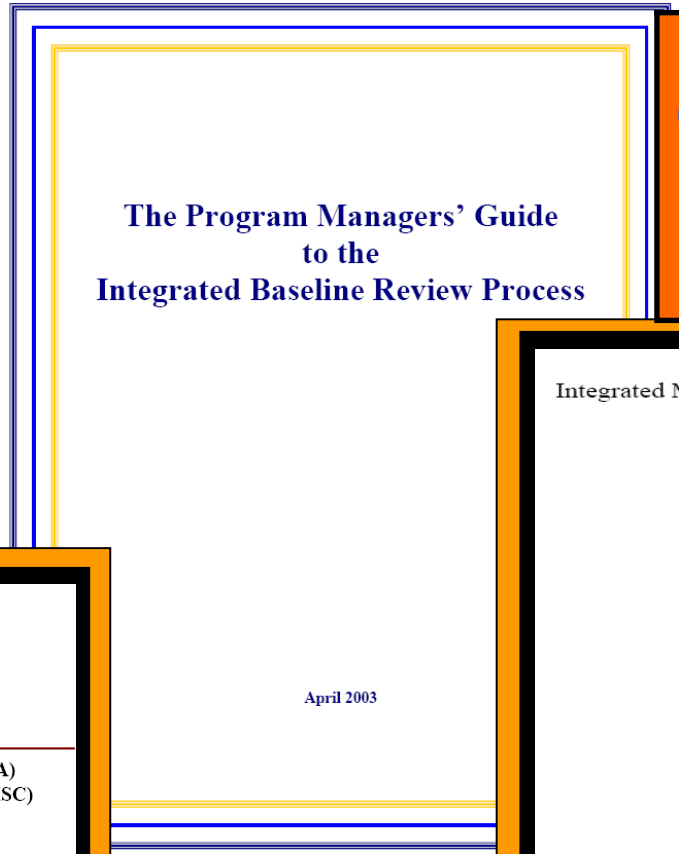

Department of Defense

Earned Value Management Implementation Guide

October 2006

EVMIG

Signed
KEITH D. ERNST
Director,
Defense Contract Management Agency

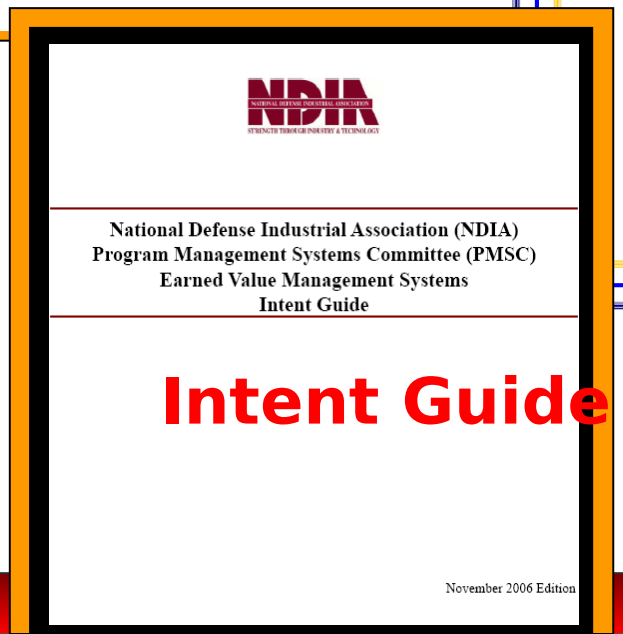

The Program Managers' Guide to the Integrated Baseline Review Process

April 2003

https://acc.dau.mil/evm

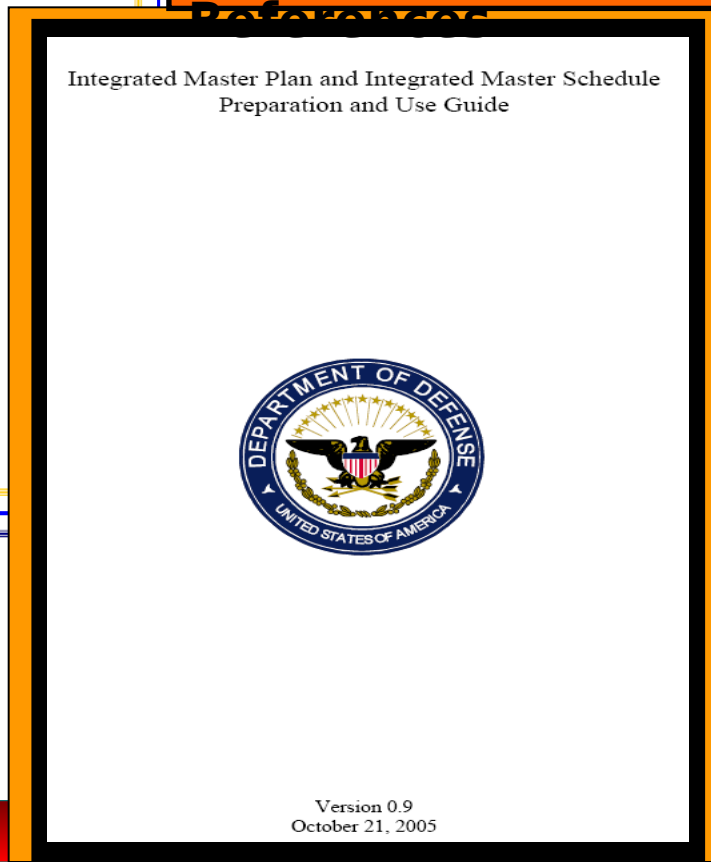
- DoD Policy
- OMB

Recommended References


National Defense Industrial Association (NDIA)
Program Management Systems Committee (PMSC)
Earned Value Management Systems
Intent Guide

Intent Guide

November 2006 Edition


Integrated Master Plan and Integrated Master Schedule Preparation and Use Guide

Version 0.9
October 21, 2005

EVMS Training—ACC EVMS CoP

Highlighted Contributions

Earned Value Special Topic #2 - Revised DoD EVM Policy - Mar 05 - by Private
Unavailable writes: ... Thu, Jun 15, 2006 9:41 PM

DAU Gold Card - December 2006 - by Private
Unavailable writes: ... Thu, Jun 15, 2006 9:41 PM

Fundamentals of EV module 1 - Basics - Updated Mar 05 - by Private
Unavailable writes: ... Thu, Jun 15, 2006 9:41 PM

Contributions

Name	File	Contributor	Modified	Type
DAU Gold Card - December 2006	1 file	Private	1-Dec-2006 1:28 PM	References
Earned Value Special Topic #1 - DAU Integrated Program Management Model	1 file	Private	23-Sep-2005 1:41 PM	Learning Materials
Earned Value Special Topic #2 - Revised DoD EVM Policy - Mar 05		Private	23-Sep-2005 2:59 PM	Learning Materials
Fundamentals of EV module 1 - Basics - Updated Mar 05	1 file	Private	30-Jun-2006 10:48 AM	Learning Materials
Fundamentals of EV module 2 - PMB		Private	27-Jun-2006 8:33 AM	Learning Materials
Fundamentals of EV module 3 - Reports - Updated Feb 05		Private	23-Feb-2005 11:23 AM	Learning Materials
Fundamentals of EV module 4 - EAC		Private	5-Oct-2004 1:02 PM	Learning Materials
Fundamentals of EV module 5 - Baseline Maintenance		Private	5-Oct-2004 1:03 PM	Learning Materials
Over Target Baseline (OTB) & Over Target Schedule (OTS) Handbook	1 file	Private	12-May-2005 10:02 AM	References

Other Related Contributions